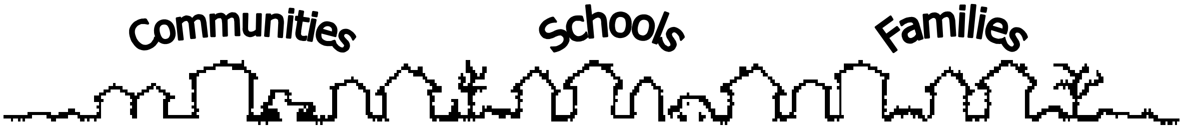
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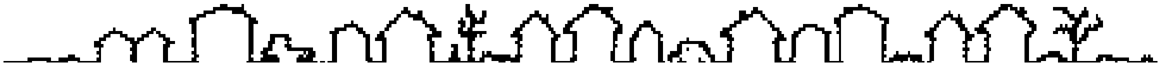
Tools for
Comprehensive School Health Programs:

Running an Effective Meeting



Wisconsin Department of Public Instruction
Wisconsin Department of Health and Family Services

Tools for Comprehensive School Health Programs: Running an Effective Meeting

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Recycled Paper

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Introduction

Collaboration: Mobilizing to Promote Healthy, Resilient, and Successful Learners

In order to ensure the health and academic success of our youth, all community members and institutions must be engaged in coordinated youth development, health promotion, and risk prevention efforts. Families, schools, health and social services professionals, justice personnel, community-based organizations, media, and others must work in concert to help guide our young on a successful life course. The missions and goals of these various community entities are often very similar. None of us can reach our goals alone. Therefore, communities need to develop the successful relationships and partnerships that are the foundations of effective collaboration. *Tools for Comprehensive School Health Programs: Running an Effective Meeting,* is a valuable resource that parents, schools, and community organizations can use to improve the health and academic success of youth in their community.

Tools for Comprehensive School Health Programs: Running an Effective Meeting provides the essential components of effective meetings. The processes and skills needed to run a good meeting are often overlooked. Good meetings are usually a precursor to good outcomes. It is rare that good outcomes result from poorly run meetings. In addition, some community partners do not regularly work in an environment where they run or even take part in meetings regularly. The tips offered in *Running an Effective Meeting* provide a strong guide for experienced and inexperienced meeting facilitators.

Acknowledgements

The materials in this document serve as a series of checklists and appendices for use by school and community personnel when engaging in collaborative projects related to Comprehensive School Health Programs and youth health and safety initiatives. Through the efforts of individuals representing the Wisconsin *Department of Public Instruction* and the *Department of Health and Family Services,* we have put this document together keeping in mind both concise *form and* easy to use *function.* As a workgroup, the members of these agencies hope this document assists you in building future partnerships.

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Running an Effective Meeting

Narrative

I. Preparing for the Meeting

☐ **Define the purpose, objectives, and outcomes**
What do you expect to result from this meeting?

☐ **Determine what type of meeting is necessary (face-to-face, conference call, etc)**
Not every meeting needs to be face-to-face. Consider the logistical needs of meeting participants and the functional needs of the meeting.

☐ **Set time and place based on mutual availability**
When and where is best for the majority of meeting participants?

☐ **Select meeting participants**
Make sure all of the key players are a part of the process.

☐ **Make invitations**
Participants should receive a formal written invitation. Additional personal invitations to key participants can also ensure meeting success.

II. Developing an Agenda

☐ **Develop a thorough agenda**
A well-constructed agenda keeps the meeting on task and moving. In developing the agenda, you should also consider the most appropriate forms of participation (i.e. brainstorming, small group work, large group discussion, etc.). Ideally, the agenda should include the following:

Meeting time
Date
Location
Who called meeting
Purpose and desired outcomes
Agenda items
Desired outcomes for each agenda item
Persons responsible for each item
Time allotted to each item
Required materials and necessary preparation
Breaks
Ground rules

☐ **Disseminate agenda and necessary materials in advance of meeting**
Participants should have a copy of the agenda and meeting materials far enough in advance so they can prepare for the meeting.

III. Facilitating a Meeting

Opening the Meeting

☐ **Start and end on time**
Punctuality counts when people are on a schedule.

☐ **Do introductions and provide nametags or table tents if appropriate**
A meeting is greatly enhanced if you assure that everybody knows each other's names. People do not like to admit they have forgotten somebody's name, so nametags and tents assure that names are not a problem.

☐ **Establish expectations**
Restate the purpose, objectives and outcomes for the meeting

☐ **Review and revise agenda**
Give participants a chance for input on the content and process of the meeting before you begin.

☐ **Assign roles**
Take time at the beginning of the meeting to recruit a timekeeper, recorder, and other roles.

☐ **Determine what notes should be taken and to whom they should be sent**
Notes serve three primary purposes: providing information for people not attending, keeping an historical record, and recording action steps. Decide which of these is relevant and take notes accordingly.

☐ **State ground rules**
State up front what the parameters of the meeting (i.e. decision-making process, group authority, conduct, budget constraints, etc.)

Encouraging participation

☐ **Utilize participation techniques**
How can the collective ideas and insights of the meeting participants best be gathered?

☐ **Maintain meeting focus**
Keep participants on time and on task.

☐ **Develop action steps**
Identify specific actions to be taken, who will take them, and by when they will be completed.

IV. Concluding the Meeting

☐ **Review action steps to be completed**
Who is going to perform action steps?
When will action steps be complete?

☐ **Final comments**
Give participants a chance to provide closing comments on the content of the meeting.

☐ **Discuss need for additional meetings**
Is another meeting in order?

☐ **Set dates, times and agenda items for the next meeting**
If possible, set meeting schedule for the long term to assure more complete participation.

☐ **Assess meeting**
Get constructive critiques of the meeting and integrate recommendations into the process of the next meeting.

V. Following the Meeting

☐ **Send out minutes in a timely fashion**
Make sure everybody who needs it has a record of the meeting.

☐ **Follow up with key people who were not in attendance**
Who else needs to know about what happened in the meeting?

☐ **Follow up with people responsible for action steps**
Friendly reminders and support help get the job done.

☐ **Send out thank-you notes or calls to meeting participants**
Showing your appreciation for input lets others know the value of their participation.

Running an Effective Meeting

Summary Checklist

I. Preparing for the Meeting

☐ Define the purpose, objectives, and outcomes
☐ Determine what type of meeting is necessary (face-to-face, conference call, etc)
☐ Set time and place based on mutual availability
☐ Select meeting participants
☐ Make invitations

II. Developing an Agenda

☐ Develop a thorough agenda
☐ Disseminate agenda and necessary materials in advance of meeting

III. Facilitating a Meeting

Opening the Meeting
☐ Start and end on time
☐ Do introductions and provide nametags or table tents if appropriate
☐ Establish expectations
☐ Review and revise agenda
☐ Assign roles
☐ Determine what notes should be taken and to whom they should be sent
☐ State ground rules

Encouraging Participation
☐ Utilize participation techniques
☐ Maintain meeting focus
☐ Develop action steps

IV. Concluding the Meeting

☐ Review action steps to be completed
☐ Final comments
☐ Discuss need for additional meetings
☐ Set dates, times and agenda items for the next meeting
☐ Assess meeting

V. Following the Meeting

☐ Send out minutes in a timely fashion
☐ Follow up with key people who were not in attendance
☐ Follow up with people responsible for action steps
☐ Send out thank-you notes or calls to meeting participants

Appendix #1

Examples of Purposes and Desired Outcomes of Meetings

PURPOSE	DESIRED OUTCOME
To develop an action plan	An action plan
To generate a list of ideas	A list of ideas
To decide	A decision
To clarify	An understanding of
To solve a problem	A solution
To coordinate activities	An action plan
To list the pros and cons	A list of pros and cons
To review the data	An understanding of the data
To identify roadblocks	A list of roadblocks

Appendix #2

Agenda Format

Date:

Starting time: Ending time:

Meeting called by: Location:

Participants:

Purpose:

Desired outcome:

Agenda Item	Desired Outcome	Person Responsible	Time Allotted

Necessary preparation:

Ground rules:

Appendix #3

Sample Meeting Agenda

Date: 4/18/94

Starting time: 3:30 p.m. **Ending time:** 4:45 p.m.

Meeting called by: Mike Albott **Location:** Room 4, Northcrest Elem. School

Participants: School Improvement Team Members (Scott Seth, Marilyn Jones, Juanita Brown, Bill Starr, Jose Alvarez, LeRoy Bierlein, Anita LaManol)

Purpose: To discuss the positive discipline plan for 1994-1995 school year

Desired Outcomes: (1) Familiarity with other schools' positive discipline plans
(2) A prioritized list of components of Northcrest's Plan

Agenda Item	Desired Outcome	Who	Time
1. Review, purpose, desired Outcome, agenda, ground rules	Agreement on purpose, desired outcome agenda, ground rules	Mike A.	10 min.
2. Discuss attached discipline plans	Familiarity with plans from Woodlot, Central, & Meadow Schools	Bill S.	15 min.
3. Brainstorm components for Northcrest's Plan	A list of components for Northcrest's Plan	Juanita B.	20 min.
4. Prioritize components	Agreement on prioritized list	Juanita B.	20 min.
5. Wrap-up	Clarification of action register, Issue Feedback on today's meeting Topics, date, and time for next meeting	Mike A.	10 min.

Note: Please read attached positive discipline plans from Woodlot, Central, and Meadow Schools prior to this meeting.

Necessary preparation:

Ground Rules:

Appendix #4

Ground Rules

It is best to define ground rules at the beginning of the meeting. A group that meets often may have standing ground rules with additions or deletions made for individual meetings as necessary. Ground rules not only set expectations for positive behavior, they also help limit negative behavior. The following lists some common ground rule topics:

Common Ground Rule Topics and Examples

Topic	Example
Type of participation desired	• Active participation by all • All ideas are good ideas
Non-negotiable items	• Budget of $3,500 • Meeting must end by 4:45
Role assignments	• Recorder • Timekeeper
Confidentiality issues	• Confidentiality is expected • All conversations stay in this room
Decision-making procedure	• Consensus • Majority rules • Gathering input today; decision made later
Behavior boundaries	• One person speaks at a time • Minimize side conversations • No interruptions
Basic housekeeping issues	• Smoking in corridor only • Short break every hour

Appendix #5

Brainstorming Guidelines

1. The group leader reviews the brainstorming process and solicits agreement on the following ground rules:
    - Ask questions only for clarification.
    - Try to piggyback off others' ideas.
    - Look past the obvious.
    - It's okay to pass.
    - No evaluation of ideas.

2. The group leader presents the problem as a question and writes it at the top of the flipchart board.

3. Participants write down their ideas; no discussion. (This step is optional. If some participants are hesitant to share their ideas, having the ideas in writing will give them courage.)

4. Ideas are written on the flipchart (or board). They can be generated through a polling or popcorn approach.

    Polling (to make sure each person's ideas are heard)—Go around the room twice to gather each individual's ideas one at a time. After two rounds, the process is opened so that anybody can offer additional ideas.

    Popcorn (to help participants build on each other's ideas)—Participants offer ideas when the ideas are hot. There is no systematic polling of the room; anyone can offer an idea at any point.

5. After all the ideas have been written on the flipchart or board, review them with the team. Clarify any questions on the meanings of the ideas. Combine obvious duplicates. The author of an idea has veto power over whether or not it should be combined.

Appendix #6

Meeting Feedback

1=Strongly Disagree 4=Neutral 7=Strongly Agree

1. The purpose and desired outcome(s) were clearly stated.	1	2	3	4	5	6	7
2. The leader was adequately prepared.	1	2	3	4	5	6	7
3. Participants were adequately prepared.	1	2	3	4	5	6	7
4. I received enough advance notice on this meeting.	1	2	3	4	5	6	7
5. The agenda was reviewed at the beginning of the meeting.	1	2	3	4	5	6	7
6. The ground rules were reviewed at the beginning of the meeting.	1	2	3	4	5	6	7
7. The times set for the agenda items were realistic.	1	2	3	4	5	6	7
8. The discussion remained focused.	1	2	3	4	5	6	7
9. A productive pace was maintained.	1	2	3	4	5	6	7
10. Participation was balanced.	1	2	3	4	5	6	7
11. Differing viewpoints were encouraged.	1	2	3	4	5	6	7
12. Disruptive behavior was dealt with effectively.	1	2	3	4	5	6	7
13. Action plans were developed.	1	2	3	4	5	6	7
14. Conclusions were reached.	1	2	3	4	5	6	7
15. The type of meeting was appropriate for the task and situation.	1	2	3	4	5	6	7